



Do You Have Your Financial Plan?

Discover what you need to know to prepare for a secure retirement income.

Whether you are just beginning the financial planning process or have already laid the foundation and are building a secure retirement future, CalPERS has a **Free Financial Planning Seminar** that will meet your needs.

If you are more than 10 years away from retirement:

Achieving Financial Security 8:30 AM – 3:45 PM

If you are 10 or less years away from retirement:

Retirement and Estate Planning 8:30 AM – 3:45 PM

Topics Include:

- *CalPERS Benefits*
- *Financial Planning (goal-setting, budgets, spending, saving, increasing retirement income)*
- *Insurance*
- *Investment Basics and Strategies*
- *Estate Planning*

It's easy to register. Find a date and location on the attached schedule, then do one of the following:

- **Call Toll Free (888) CalPERS (225-7377)**
- **Mail or fax the completed registration form to your local CalPERS Regional Office. (FAX numbers located on Registration Form)**
- **View the schedule and register online using your PIN at www.calpers.ca.gov**



Enrollments will be confirmed in writing. Seminar materials will be sent approximately two weeks prior to date of seminar.

January - June 2005 DATES AND LOCATIONS OF FINANCIAL PLANNING SEMINARS

AFS = Achieving Financial Security

REP = Retirement and Estate Planning

CalPERS Regional Offices

Sacramento Office

SACRAMENTO

AFS - Jan 8, Jan 11, Jan 20, Feb 25,
Mar 2, Apr 4, May 3, May 18,
Jun 15

REP - Jan 5, Jan 13, Jan 21, Jan 31,
Feb 1, Feb 5, Feb 11, Feb 17,
Feb 28, Mar 8, Mar 12, Mar 18,
Mar 21, Mar 29, Apr 7, Apr 12,
Apr 23, Apr 25, May 6, May 12
May 19, Jun 17, Jun 20

AUBURN

REP - Apr 5

CHICO

AFS- Jan 12

REP- Jun 7

MODESTO

REP- Mar 22

AFS- Mar 23

REDDING

AFS- Mar 15, Jun 30

REP - Mar 16, Apr 27, Jun 29

SONORA

REP- Apr 14

STOCKTON

REP - Feb 9, Jun 22

AFS- Feb 8

SUSANVILLE

AFS- Apr 20

YUBA CITY

REP- Jan 26

San Diego Office

SAN DIEGO

REP - Feb 9, Mar 17, Apr 21, May 10
Jun 2

AFS - Feb 8, Apr 20

San Bernardino Office

SAN BERNARDINO

REP- Feb 2, Mar 22, Apr 28, Jun 15

AFS- Apr 27

RIVERSIDE

AFS - Mar 3

REP- Mar 2

San Francisco Office

SAN FRANCISCO

REP - Jan 7, Apr 14, Jun 3, Jun 17

AFS - Jan 13, Apr 22

ARCATA

REP - Mar 24

AFS - Mar 25

SANTA ROSA

REP - Feb 17

AFS - Feb 18

UKIAH

REP - Mar 10

VACAVILLE

REP - May 12

Orange Office

ORANGE

AFS - Mar 10, May 11

REP - Feb 23, Mar 22, Apr 13,
Jun 22

CERRITOS

REP - Feb 2

SIGNAL HILL

REP- Jun 16

Fresno Office

FRESNO

REP - Feb 10, Mar 23, Apr 26

AFS- Apr 6, Jun 16

BAKERSFIELD

REP - Mar 8, May 5

MERCED

REP - Feb 16

MONTEREY

REP - Mar 15, May 10

AFS- Apr 14

Glendale Office

GLENDALE

AFS - Mar 12 (Sat), Jun 10

REP - Feb 2, Mar 24, Apr 27,
May 18, Jun 22

CULVER CITY

REP- Jan 25

AFS- Mar 18

COVINA

REP - Apr 26

GARDENA

AFS- May 27

HAWTHORNE

REP- Feb 16

LOS ANGELES

REP - Jan 27

MORRO BAY

REP- May 14 (Sat)

NORWALK

REP- Apr 13

PISMO BEACH

REP- Feb 9

POMONA

REP- Feb 1

SAN LUIS OBISPO

AFS- Feb 8

SANTA BARBARA

REP- Mar 8

AFS- Mar 7

VENTURA

REP- Jun 2

WALNUT

REP- Mar 15

WHITTIER

REP- Jun 7

San Jose Office

MOUNTAIN VIEW

AFS - Mar 17

REP - Mar 18, May 11

CAPITOLA

REP- Feb 1

GILROY

REP Feb 24

SAN JOSE

REP - Feb 9, Apr 5, Jun 7

AFS - Jan 19

SAN MATEO

REP- Apr 28

SANTA CRUZ

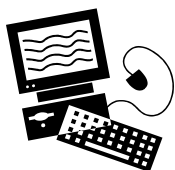
REP- May 10

REDWOOD CITY

REP - Mar 4, Jun 28

WATSONVILLE

REP- Apr 6



Logon and register for the seminar of your choice at www.calpers.ca.gov.
Also see a complete course description and an up-to-the-minute list of
available seminars in your area. Registration is also available by calling
CalPERS at toll-free (888) 225-7377



FINANCIAL PLANNING SEMINAR REGISTRATION

SECTION I: CalPERS Regional Offices

SACRAMENTO 2750 Gateway Oaks Dr. Suite 140 Sacramento, CA 95833 FAX (916) 231-7917	SAN FRANCISCO 301 Howard St. Suite 2020 San Francisco, CA 94105 FAX (415) 369-8501	GLENDALE 655 North Central Ave. Suite 1400 Glendale, CA 91203 FAX (818) 662-4304	SAN BERNARDINO 650 East Hospitality Lane Suite 330 San Bernardino, CA 92408 FAX (909) 806-4820
FRESNO 10 River Park Place East Suite 230 Fresno, CA 93720 FAX (559) 440-4901	SAN JOSE 181 Metro Drive Suite 520 San Jose, CA 95110 FAX (408) 451-8001	ORANGE 500 No. State College Blvd. Suite 750 Orange, CA 92868 FAX (714) 939-4701	SAN DIEGO 7676 Hazard Center Drive Suite 350 San Diego, CA 92108 FAX (619) 220-7201

To Register: Call (888) CalPERS (225-7377) or Mail/FAX Form to Appropriate CalPERS Office

*Privacy Statement: Providing the Social Security Number is voluntary in accordance with the Information Practices Act of 1977 and the Privacy Act of 1974 (PL93-679). If provided, the Social Security Number may be used by departments to maintain records of training requested and attended by members.

SECTION II: Seminar Information

CHECK ONE ☐ **ACHIEVING FINANCIAL SECURITY** ☐ **RETIREMENT & ESTATE PLANNING**
BOX ONLY: (For members *more than 10 years* from retirement) (For members *10 or less years* from retirement)

First Choice	Date	Location
Second Choice	Date	Location
Third Choice	Date	Location

SECTION III: Member Information

Member's Social Security No.: **Member's Name:** Last First (Print or Type)

Employer:

Disability Accommodation: ☐ **Auditory** ☐ **Mobility** ☐ **Visual** ☐ **Other**

Type of Accommodation Needed (Please specify):

SECTION IV: Spouse/Partner Information

Will Spouse/Partner Attend? ☐ **YES** **Is Spouse/Partner a CalPERS Member?** ☐ **YES** (If YES, complete this section)

Spouse/Partner's Social Security No.: **Spouse/Partner's Name:** Last First (Print or Type)

Spouse/Partner's Employer:

SECTION V: Enrollment Notification Information

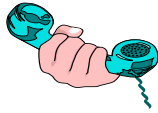
Where Should Enrollment Notification Be Sent? ☐ **to MEMBER** ☐ **to EMPLOYER**

Employer's Name: **Daytime Telephone Number:**

Division and ARU/MIC: (if applicable)

Member's or Employer's Address: **Contact Person (if applicable)**

City, State, and Zip Code: **Your Daytime Phone Number:**



QUESTIONS?

CALL TOLL FREE (888) CalPERS (225-7377)

Notification of Enrollment

An initial letter of enrollment notification will be mailed to the member.

A second notification letter with program materials will be mailed approximately two weeks before the seminar date.

Cancellations

If you find that you will be unable to attend your scheduled seminar, please phone your cancellation to CalPERS at Toll Free (888) CalPERS (225-7377).

Additional Information

For specific information regarding the seminars (facility, address, etc.), contact CalPERS at Toll Free (888) CalPERS (225-7377).

CalPERS Web Site - www.calpers.ca.gov

